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| Team 2 |
| Document Management Process |
| Project Name |

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| Carla Machado  23-02-2013 |

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|  |  |  |  |
| --- | --- | --- | --- |
| **Authors and Contributors** | | | |
| **Date** | **Name** | **Contacts** | **Contribution** |
| 23-02-2013 | Carla Machado | a21170460@alunos.isec.pt | Author |
| 23-02-2013 | Mário Oliveira | a21170292@alunos.isec.pt | Author |
| 28-02-2013 | Filipe Brandão |  | Contributor |
|  |  |  |  |
|  |  |  |  |

Table 1: List of Contributors

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Revision History** | | | | | |
| **Date** | **Description** | **Author** | **Version** | **Approvers** | **State** |
| 23-02-2013 | Creation of first draft | Carla Machado & Mário Oliveira | 0.1 |  | Draft |
| 27-02-2013 | Update of the process. Introduction of a new Sate | Carla Machado & Mário Oliveira | 0.2 |  | Ready for Revision |
| 28-02-2013 | Document Review | Filipe Brandão | 0.2 |  | Ready for Revision |
| 28-02-2013 | Changes as result of the review | Carla Machado & Mário Oliveira | 0.3 |  | Draft |
| 02-03-2013 | Ready for new revision | Carla Machado & Mário Oliveira | 0.3 |  | Ready for Revision |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

Table 2: Version history

# Purpose

The objective of this document is the definition of the document management process which purpose is to assure that all documents are available to all team members and also all stakeholders. Furthermore it assures that the latest versions are approved and accessible and that all changes are controlled and registered.

# Inputs and Outputs

In this chapter the inputs and the outputs of the document management process will be described.

# Inputs

The inputs of this process will be the necessity of creating a new document or updating an existing one.

# Outputs

The output of the process will be a baselined or a deprecated document.

# Activities

In this chapter the activities associated with this process will be described.

The main activities associated with this process will be the creation of new documents and the update of existing documents.

# Creating a new Document

To create new documents follow the following steps

* **New Document**
  + The team member that creates the document is the document owner and must:
    - Create an Office document and edit its proprieties filling the:
      * Author
      * Title
      * State with the value “Draft”
      * Company with the team name
      * Comments with V0.1
      * Subject with the project name
    - Fill the tables Authors and Contributors and the Revision History
    - Add and commit the new document to the SVN repository in the folder Docs
  + Update Measures
* **Edit**
  + The document is edited by the collaborators
  + Each collaborator adds its name to the Authors and Contributors and to the Revision History table
  + Each collaborator does the commit of the changes that were made
  + If necessary update field Comments of the document proprieties to V0.X+1
* **If document is edited**
  + Update the Revision History table changing the state to “Ready for Revision” with respective comment
  + Update the document properties changing the State to “Ready for Revision”
  + Update the field Comments of the document proprieties to V0.X+1
  + Commits the document with current state comment to the SVN folder
  + Update Measures
* **Revision**
  + The revision of a document is made by a single person:
    - In order to choose the reviser take into account the following hierarchy choosing the first valid person:
      * Librarian Manager
      * Technical Manager
      * Project Manager
      * Quality Manager
      * Other
    - In order for a reviser to be valid he can´t be the Owner, Author or collaborator that edited the document
  + The reviser must add a comment to the Revision History table
  + The reviser must make use of the track changes tool of Microsoft
  + The revision doesn’t lead to updating the version number
* **If document is reviewed**
  + The reviser must notify the document owner
  + The owner and authors must view the results of the revision and taking them into to account edit the document
  + If the results of the revision leads to editing the document:
    - the document is altered following the revision and the authors must update the field Comments of the document proprieties to V0.X+1
    - The state must be updated to “Draft”
  + If the results of the revision don’t lead to editing the document:
    - Update the document properties changing the State to “Ready for Approval “
    - Update the Revision History table changing the document State with respective comment
    - Commit the current state with a comment to the SVN folder
  + Update Measures
* **If document is ready for approval**
  + The owner must notify the team for document approval. The method used to notify the approvers can be by speaking with the approvers or using the Facebook group
* **Approve**
  + For the document to be approved it must be approved by, at least, two people:
    - In order to choose the approver take into to account the following hierarchy choosing the first two valid approvers:
      * Quality Manager
      * Project Manager
      * Technical Manager
      * Librarian Manager
      * Other
    - In order for an approver to be valid he can´t be the Owner, Author or document Reviser
  + Each approver must add a comment to the Revision History table
* **If document is approved**
  + The owner must:
    - Update the Revision History table changing the document Version to 1.0 and the Sate to “Baselined” and also adding a baselined comment
    - Update the document proprieties changing the State to “Baselined”
    - Update the field Comments of the document proprieties to V1.0
    - Update Measures
    - Commits the baselined comment to the SVN folder

# Updating a Document

The updating of a document can be originated to update the content of the document or to make the document obsolete, change the state to Deprecated. The steps “**If document is approved”** and **“If document is deprecated”** are alternate paths for the activity.

In order to update an existing document the following steps must be executed:

* **Change Request** 
  + The team member that is requesting the document update must:
    - Get the approval of, at least, two people. The method used to get the approval can be by speaking with the approvers or using the Facebook group:
      * In order to choose the approver take into to account the following hierarchy choosing the first two valid approvers:
        + Document Owner
        + Quality Manager
        + Project Manager
        + Technical Manager
        + Librarian Manager
        + Other
      * In order for an approver to be valid he can´t be the team member proposing the document update
* **If Change Request is approved**
  + The document owner must update the document proprieties changing the State to “Draft” and the field Comments to VX.1. Furthermore a new entry in the Revision History table changing the document version and state must be added
  + The team member that proposes the change and the approvers each must add a new entry to the Revision History table with a comment. If necessary they must also add their names to the Authors and Contributors table
* **Edit**
  + If the updating request is to turn the document deprecated, execute the step “**If document is deprecated**”
  + The document is edited by the collaborators
  + Each collaborator adds its name to the Authors and Contributors and the adds to the Revision History table
  + Each collaborator commits the changes that he made
  + If necessary update field Comments of the document proprieties to V0.X+1
* **If document is edited**
  + Update the Revision History table changing the state to “Ready for Revision” with respective comment
  + Update the document properties changing the State to “Ready for Revision”
  + Update the field Comments of the document proprieties to VX.Y+1
  + Commits the document with current state comment to the SVN folder
  + Update Measures
* **Revision**
  + For the document to be reviewed it must be reviewed by a person:
    - In order to choose the reviser take into account the following hierarchy choosing the first valid person:
      * Librarian Manager
      * Technical Manager
      * Project Manager
      * Quality Manager
      * Other
    - In order for a reviser to be valid he can´t be the team member that originated the document update
  + The reviser must add a comment to the Revision History table
  + The reviser must make use of the track changes tool of Microsoft
  + The revision doesn’t lead to updating the version number
* **If document is reviewed** 
  + The reviser must notify the document owner
  + The owner and authors must view the results of the revision and taking them into to account edit the document
  + If the results of the revision lead to editing the document:
    - The document is altered following the revision the authors must update the field Comments of the document proprieties to VX.Y+1
    - The state must be updated to “Draft”
  + If the results of the revision don’t lead to edit the document:
    - Update the document properties changing the State to “Ready for Approval”
    - Update the Revision History table changing the document State with respective comment
    - Commits the document with current state comment to the SVN folder
  + Update Measures
* **If document is ready for approval**
  + The owner must notify the team for document approval. The method used to get the approval can be by speaking with the approvers or using the Facebook group
* **Approve**
  + For the document to be approved it must be approved by, at least, two people:
    - In order to choose the approver take into to account the following hierarchy choosing the first two valid approvers:
      * Document Owner
      * Quality Manager
      * Project Manager
      * Technical Manager
      * Librarian Manager
      * Other
    - In order for an approver to be valid he can´t be the reviser or team member that originated the document update
  + Each approver must add a comment to the Revision History table
* **If document is approved**
  + The owner must:
    - Update the Revision History table changing the document Version to X+1.0 and the Sate to “Baselined” and also adding a baselined comment
    - Update the document proprieties changing the State to” Baselined”
    - Update the field Comments of the document proprieties to VX.Y+1
    - Update Measures
    - Commits the document to the SVN folder
* **If document is deprecated**
  + The owner must:
    - Update the Revision History table changing the Sate to “Deprecated” and also adding a comment
    - Update the document proprieties changing the State to “Deprecated”
    - Update Measures
    - Commits the document to the SVN folder

# Tools

The documents will be created using Microsoft Office and saved in the Docs file in the team SVN repository.

Facebook will also be used for logging comments.

# Related Processes

There are none existing related processes.

# Measures

The measures to take into account as far as documents are:

* The number of baselined documents
* The number of draft documents
* The number of document waiting to be reviewed
* The number of documents waiting for approval
* The number of deprecated documents
* The global change rate (Number of changes / number of baselined documents)

These measures are identified in “Documents Measures”.